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Abstract

3 A group trading software application and method for remotely
4 based investment managers providing the capability for managing
5 multiple investment accounts by user defined groups. The groups
6 can contain multiple investment and subgroups, each of which can
7 be defined by the user around such criteria as on an ad hoc
8 basis, on common levels of risk and by groups of owners.

9 Multiple trading day fund cut off times for each group or
10 subgroup are supported. Pending and complete trade status for
11 each individual account, groups and/or subgroup is provided. The
12 investments can be in any financial product, including
13 annuities, mutual funds and insurance policies.

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